

ADMINISTRATIVE  
INTERNAL USE ONLY

October 1968

### Historical Documents: A Checklist

The following types of documents (or records in any other form) should be exempted from record purges except as individual documents are duplicated and accessible in other holdings.

#### Policies

Documents showing the development of policy, including planning stages, draft plans, deliberations, agreements and dissents, decision, and follow-up.  
All other policy papers.

#### Organization

Establishment and termination of components.  
Tables of organization, and changes thereof.  
Organizational charts.  
Key assignments of personnel.  
Office evolution reports.

#### Responsibilities

Legislation--proposed, effected, or repealed.  
Statements of function.  
Lists of objectives or priorities.  
Command decisions; action directives.  
Statements of operational requirements.  
Standing instructions.  
Operational programs.  
Mission directives.

#### Agreements

Coordinated plans, effected or aborted.  
Interagency agreements and records of dissent.  
Liaison protocols.

#### Progress Reports

Annual and other periodic activity reports and program evaluations, including supporting documents, significantly revised drafts, sanitized versions, and follow-up or updating papers.  
One-time post-mortems, validity studies, after-action investigations, administrative post-audits, inspection reports, and other surveys, including supporting documents and follow-up.

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-2-

Miscellaneous Compilations

- Briefings for key officials.
- Operational highlights.
- Orientation books.
- Background summaries.
- Case histories.
- Office chronologies.
- After-action debriefings.

Indexes

- Obsolete indexes, classification and other lists, directories, and other indicator or locator systems and finding aids applicable to discontinued records.
- Chrono files of senior officers, useful as chronological indexes to other files.

\*Obsolete Materials: Recap

- Obsolete and re-written historical studies, progress reports, and program evaluations.
- Completed or cancelled investigations and inspections.
- Liquidated components and stations.
- Discontinued units, projects, programs, and functions.
- Missions accomplished, and missions defeated or scratched.
- Cancelled or deferred objectives.
- Accomplished, defeated, repealed, and amended legislation.
- Reinforced or countermanded directives.
- Superseded or repealed priorities.
- Revised and replaced methodologies.
- Terminated, retired, or dormant sources and liaison systems.
- Rejected or withdrawn plans, options, and alternate courses of action.
- Discarded or aborted targets.
- Cancelled policy agenda.
- Outmoded materiel and techniques.
- Obsolescent or aborted innovations.
- Abandoned indexes or locator systems.

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Approved For Release 2002/06/05 : CIA-RDP78-03087A000100030021-8

## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

## Historical Documents Checklist

File  
OTR *Secretary*

FROM:		EXTENSION:		NO.	
Chief, Plans and Management, OTR				DATE	
TO: (Officer designation, room number, and building)		DATE		OFFICER'S INITIALS	
		RECEIVED	FORWARDED	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)	
1. O/DTR				<p>When considering which of your records may be destroyed rather than retired to the Record's Center, you may find the attached checklist on Historical Documents helpful. Although types of documents mentioned on the checklist are exempted from records purges, please note that documents kept in the DTR's Office for record purposes and eventual retirement (Weekly Activity Reports, for example) do not have to be kept by the originating offices beyond the time that they are frequently referred to. Systematic destruction of all "non-record" material is encouraged.</p>	
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